

Edmonton



ANNUAL

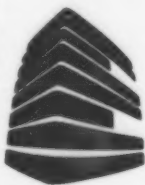
ECONOMIC REPORT



Edmonton—City of Champions

Cover

The Edmonton Folk Music Festival is one of seven annual summer festivals that take place in Alberta's capital city.



**EDMONTON
ECONOMIC
DEVELOPMENT
AUTHORITY**

The Edmonton Economic Development Authority has been established to promote and develop the Edmonton economy. The Authority's goal is to achieve a diverse and stable economic base for Edmonton. The Edmonton Economic Development Authority is responsible for the initiation of economic development programs that support local industry as well as attract new economic growth.

Edmonton's \$200 million Canada Place complex is one of several new commercial developments changing the city's skyline.

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Chairman's Message

As Chairman of the Edmonton Economic Development Authority, I am pleased to submit the Edmonton Annual Economic Report.

Nineteen eighty-seven was a year of renewed economic confidence for Edmonton's business community and the outlook for 1988 and 1989 is for the continuation of this positive trend.

One result of this renewed confidence is reflected in the energy industry where over \$17 billion worth of proposed major oil, gas, and oil sand projects for the Edmonton market area have been announced. As the province's major oil and gas supply and service centre, Edmonton-based manufacturing and distribution firms are prepared for substantial new and expanded activity.

Similarly, the petrochemical industry - another mainstay of Edmonton's economy - is also experiencing new growth. In 1987, Metro Edmonton petrochemical firms shipped nearly \$1.3 billion in manufactured goods. This figure will easily be surpassed in the next few years as a number of new and expanded plants come on stream in the city's trading area. Projects being developed or planned include: the \$270 million Celanese - Neste Oy/Trans Mountain Pipe Line Co. Ltd. project, the \$400 million Novacor Chemicals Ltd. Ethylene III project, the \$1.6 billion in plastics and petrochemical plants related to the Novacor Joffre expansion, the \$150 million Dow Chemical project and the \$150 million Chevron Canada project.

Recently, Edmonton has become the province's major forestry service and supply centre. Close to \$2 billion worth of forestry projects are slated for the Edmonton market area. Projects currently under development include: the \$500 million Daishowa Canada pulp mill, the \$360 million Alberta Newsprint Company project, the \$400 million Kruger Inc. project, the \$200 million Millar Western Industries project, the \$55 million Pelican Spruce Mills project and the \$40 million Weldwood of Canada project.

With the majority of the province's forests located to the north and northwest of Edmonton, the forest resource industry is looking to Edmonton for many of the services and supplies associated with developing these massive projects.

Approximately \$2.5 billion worth of new pipeline projects are also under consideration for the Edmonton service area. This renewed pipeline activity will provide pipe manufacturers, engineers, construction firms, and suppliers with numerous business opportunities.

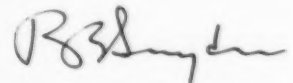
Edmonton's growing business confidence is also reflected in the substantial construction activity that took place in 1987 and continues into 1988. More than \$500 million worth of commercial construction is underway in Edmonton's downtown core. This includes the \$250 million Eaton Centre phase II complex, the \$200 million Canada Place project, the

\$60 million Olympia and York office/retail development, and the \$50 million Kingsway Garden Mall expansion. Projects announced for a 1988 start-up include the \$74 million renovation of the Royal Alexandra General Hospital, the \$78 million Cross Cancer Institute expansion, the \$12 - \$15 million Journal building, and the \$18 million Centre for Frontier Engineering Research facility.

The city's strategic location in Alberta and Western Canada has enabled Edmonton to become the major manufacturing and distribution centre in the province, providing many opportunities for new or expanded business ventures.

Edmonton is truly a City of Champions offering an exceptional quality of life with rich cultural activities, a beautiful river valley, and outstanding sports and recreation facilities.

The Edmonton Economic Development Authority's role is to assist business and industry assess the Edmonton economy. Metro Edmonton has an impressive list of locational advantages to offer. The Authority is ready to work with individuals and companies, in confidence, providing information concerning Edmonton and our marketing area. If we can be of service to you, please contact us.



R.B. (Bob) Snyder
Chairman



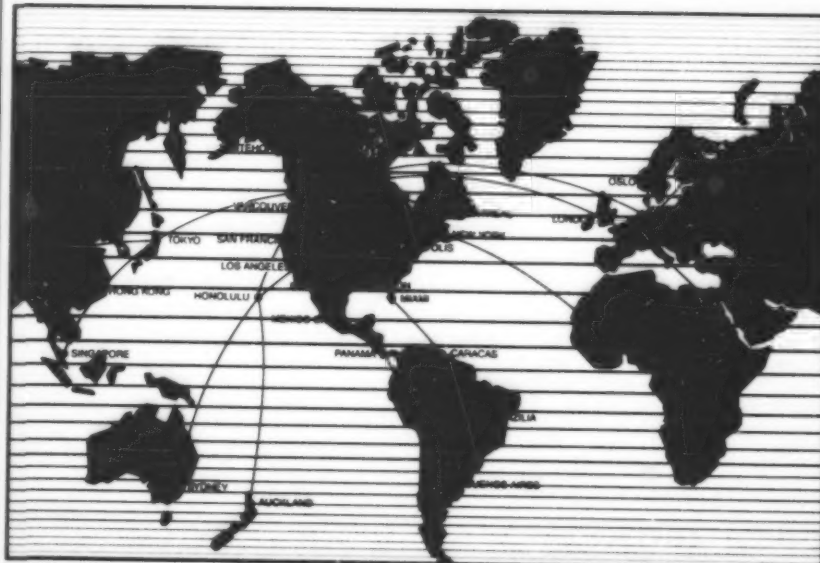
Edmonton is the capital of Alberta and the province's largest metropolitan centre.

Location

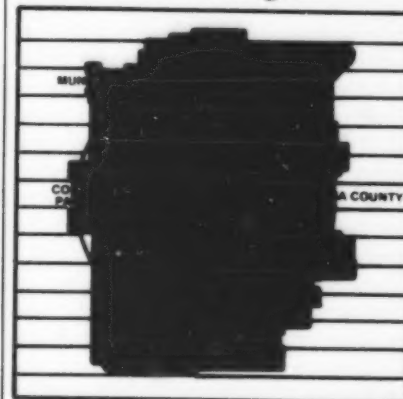
Edmonton is located at the geographic centre of Alberta and western Canada. This strategic position gives the city many advantages as a major corporate, manufacturing and distribution hub in the West.

Edmonton is the focal point of extensive oil, gas and other resource industries. The city's service area extends from central and northern Alberta to the Northwest Territories, northern British Columbia and northwestern Saskatchewan.

Map 1
Edmonton in the World



Map 2
Metro Edmonton Region



Metro Edmonton Region

- ▬ Metro Edmonton (Edmonton) Sub Region
- ▬ Edmonton Proper
- ▬ County and Municipal District Boundaries
- 48 kilometres (30 miles) radius
- 45 minutes travel time from downtown Edmonton

Natural Resources

Resource development is the mainstay of Edmonton's and western Canada's economy. Vast resource wealth and expanding domestic and international markets nurture this development.

Conventional Oil and Gas

Edmonton's importance to western Canada's oil and gas industry is illustrated by the fact that over 80% of Canada's oil reserves are in Alberta and over 80% of the producing oil wells in the province are in the Edmonton market area.

Remaining established reserves of conventional crude oil in Alberta at yearend 1987 were 613.8 million cubic metres (3.9 billion barrels). Remaining established reserves of marketable natural gas were 1.65 trillion cubic metres (58.6 trillion cubic feet). Gross revenues from oil and gas production during 1987 totalled \$15 billion.

Oil Sands

Edmonton is the major service and distribution centre for the Alberta oil sands, the largest oil sands crude bitumen deposit in the world. These deposits contain an estimated 267 billion cubic metres (1.7 trillion barrels) of in-place reserves.

Two oil sands extraction and processing plants currently operating in the Athabasca deposit near Fort McMurray use surface mining techniques. The 1987 combined throughput of these plants averaged more than 29,000 cubic metres (183,000 barrels) per day of high grade synthetic crude oil. Over \$6 billion of upgrading and expansion expenditures are in progress or planned for these plants through to 1992.

Numerous other major oil companies and consortiums are actively pursuing oil sands projects ranging from pilot plants and experimental projects to large-scale commercial developments. These include BP Exploration's Wolf Lake in situ oil sands project, Esso Resources Canada's ten phase Cold Lake in situ oil sands

Over 80% of Alberta's oil wells are in the Edmonton market area

Table 1
Petroleum Industry Expenditures 1983 - 1987
(\$ millions)

Alberta	1983	1984	1985	1986	1987*
Exploration	1,390.1	1,602.6	1,848.8	1,470.2	1,806.5
Development	906.3	996.9	1,296.1	983.1	980.8
Land	565.1	790.2	1,021.1	447.3	888.7
Producing Facilities	715.4	958.6	1,320.5	1,082.4	779.3
Producing Costs	2,227.1	2,665.5	3,280.9	3,259.6	3,396.5
Gas Plants	179.7	180.5	263.3	181.0	116.8
Royalties ^(a)	5,467.2	5,958.1	6,005.4	3,284.2	3,202.3
Other ^(b)	204.7	206.9	**	**	**
Total	11,655.6	13,359.3	15,036.1	10,707.8	11,170.9

* Oilweek estimate

** Effective as of 1985, all taxes except income taxes, are included in "Producing Costs."

Note: (a) Includes mineral tax and other changes (b) Excludes interest expense 1983-1987

Source: Oilweek, Annual Review and Forecast - 1988

recovery program, and Husky Oil's Lloydminster heavy oil recovery and upgrader development.

In addition, four other commercial operations are in the construction stage or near commissioning. These include projects being undertaken by Shell Canada, Suncor, Dome and Amoco.

Coal

Approximately three-quarters of the recoverable coal reserves in Canada are situated in Alberta, with the majority of them in close proximity to Edmonton. In-place coal resources total more than 75 billion tonnes. Thirty-one billion tonnes are recoverable using existing technology.

In 1987, subbituminous coal production totalled 17.5 million tonnes. Bituminous coal production reached 10.1 million tonnes. Coal exports in 1987 included

1.75 million tonnes to other provinces and more than 5.15 million tonnes to other countries.

Electrical utilities in Alberta are switching from natural gas to coal, to fuel their largest power generating plants. Electric energy generation, coupled with the growing demands of Pacific Rim countries for metallurgical coal, assures long-term growth for the development of this natural resource.

Construction is now past the half-way mark on the Genesee thermal power plant near Edmonton. The \$1.5 billion plant will bring 400 megawatts into the Alberta power grid in 1989. Phase II of the project will make an additional 400 megawatts available in 1991.

Coal Research Centre Devon has been established on the outskirts of Edmonton. This \$17 million facility houses researchers from the Alberta

Research Council, the federal department of Energy, Mines and Resources, and other agencies.

Agriculture

Agriculture is an important component of the Alberta economy. Farm area in the province totals more than 20.6 million hectares (51 million acres). Some 12.9 million hectares (31.9 million acres) are used in crop, livestock and other agricultural production with another 7.7 million hectares (19.1 million acres) available for future use.

Farm operations in Alberta are large and capital intensive with an average size of over 350 hectares (880 acres) and an average capital investment of almost \$500,000. Alberta is one of the most productive agricultural regions in the world, making it very competitive in world markets.

Farm cash receipts for 1987 are estimated at over \$3.9 billion. Grain crops - mainly wheat, barley and canola - account for over \$2 billion. Livestock sales and livestock products totalled \$1.9 billion.

The Edmonton market area contains over two-thirds of the province's farms and the majority of Alberta's hog and poultry production. This important agricultural sector provides a base for Edmonton's third-largest manufacturing activity, the food and beverage industry.

The Edmonton market area contains over two-thirds of the province's farms.

Table 2
Alberta Oil Sands Expenditures 1983 - 1987
(\$ millions)

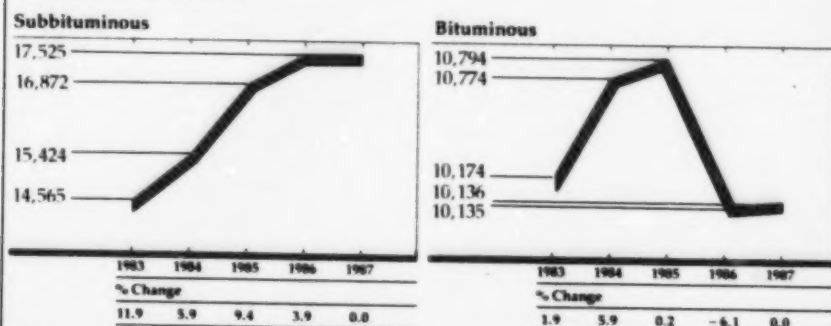
	1983	1984	1985	1986	1987*
Capital Expenditures ^(a)	422.6	510.3	1,131.5	612.8	430.0
Operating Costs ^(b)	1,048.2	1,064.3	1,225.6	1,169.3	1,052.4
Royalties	395.8	179.0	n/a	n/a	n/a
Total	1,866.6	1,753.6	2,357.1	1,782.1	1,482.4

* Oilweek estimate

Note: (a) Includes exploratory and delineation drilling, research and development, fixed installations, machinery and equipment, housing and pollution control equipment.
(b) Includes taxes, administration expense, land acquisition and retention, reclamation costs and other operating outlays.

Source: Canadian Petroleum Association

Graph 1
Alberta Coal Production 1983 - 1987
(thousands of tonnes)



Source:
Energy Resources Conservation Board - Alberta's Coal Industry, Annual Statistics - 1987

Minerals

Edmonton has ready access to an abundant supply of minerals for construction and industrial use.

Resources in the immediate vicinity of the city include industrial sand, brick clay, lightweight aggregate, limestone marl, stoneware clay, and bentonite. Plants have been established to produce cement, pottery and fibreglass products.

Forestry

Edmonton is a major service and distribution centre for Alberta's forest product industry. Northern Alberta possesses one of the largest reserves of hardwood and softwood timber in western Canada. The city supports the harvesting of the vast forest reserves which lie to the north and west of Edmonton. The province's lumber, marketed mostly in eastern Canada and the United States, is handled by rail through the city. Oriented strand board, which is rapidly replacing plywood for construction, is produced in northern Alberta. As of early 1988, construction of the Millar Western pulp mill at

Close to \$2 billion worth of forestry projects are slated for development in the Edmonton market area.

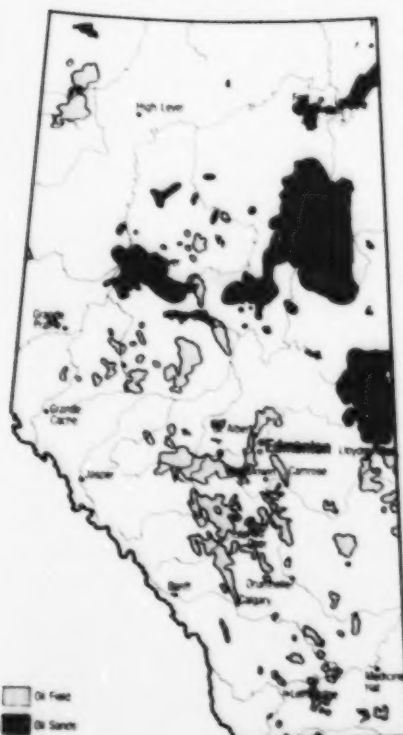
Whitecourt is nearing completion. Daishowa Canada Co. Ltd. has commenced construction of a \$500 million kraft pulp mill at Peace River. The recent announcement that Alberta Newsprint Company will construct a pulp and newsprint mill in Whitecourt is a major advancement in value-added processing of forest products. Several other international companies are seriously studying the opportunities which Alberta has to offer in forest industry development. Over \$2 billion in

capital investment is expected in the construction of mills to process northern Alberta's forest resources in the near future.

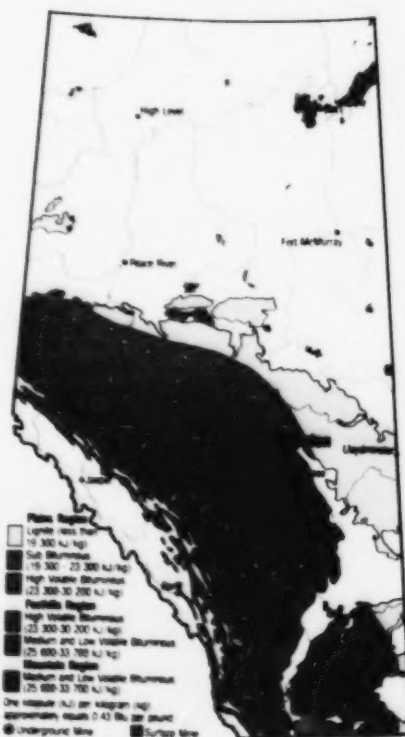
Water

More than 90% of the water flow in Alberta is in the northern part of the province, which is Edmonton's service area. The city, located on the banks of the North Saskatchewan River, provides an ample supply of high-quality water.

Map 3 - Oil Fields and Oil Sands in Alberta



Map 4 - Coal in Alberta



MAP 5 - Forests in Alberta



Industry

Alberta's natural resources and Edmonton's population base offer exceptional potential for business opportunities in the Edmonton area, making it a logical location for new or expanded commercial ventures in western Canada.

Manufacturing

The economic growth potential of western Canada provides an exciting diversity of opportunity and an increasingly affluent market for manufactured products.

In 1987, Metro Edmonton manufacturing shipments were valued at more than \$7.6 billion. With more than 60 industrial parks in the area, land zoned for industrial use totals approximately 12,000 hectares (more than 30,000 acres).

Metro Edmonton refineries process over 90% of Alberta's petroleum products.

Graph 2
Metro Edmonton
Manufactured Goods
By Major Sectors - 1987*
(\$ thousands)

	Value	% Change - 1987
Petroleum & Coal	2,929,590	- 23.7
Chemicals & Chemical		
Products	1,299,744	6.6
Food and Beverage	1,173,679	21.6
Primary Metal	538,322	10.1
Metal Fabricating	314,719	8.0
Printing, Publishing & Allied		
Industries	270,681	4.1
Machinery Industries	233,205	- 1.9
Non-Metallic Mineral Products	179,233	11.6
Miscellaneous & NES (a)	671,708	45.9
Total	7,610,881	- 6.2

* Edmonton Economic Development Authority estimates

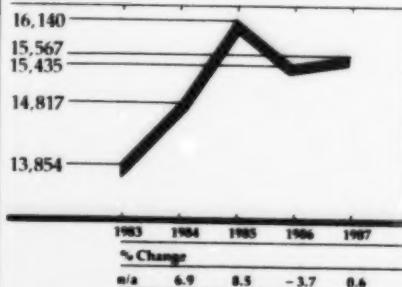
Note:

(a) Miscellaneous and NES category includes: Rubber & Plastics, Leather Industries, Textile & Clothing Industries, Wood Industries, Furniture & Fixtures, Paper & Allied Industries, Transport Equipment, Electrical Products, and Miscellaneous Products

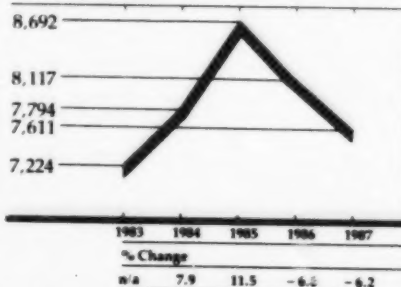
Source: Alberta Bureau of Statistics - Alberta Principal Manufacturing Statistics
Statistics Canada - Catalogue #31-203, #31-209

Graph 3
Value of Manufacturing Shipments 1983 - 1987
(\$ millions)

Alberta



Metro Edmonton*



In 1987, Metro Edmonton accounted for 69% of Alberta's manufacturing output.

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics - Alberta Principal Manufacturing Statistics
Statistics Canada - Catalogue #31-001

Petroleum and Coal

The petroleum and coal industries have been the prime factors in the economic growth experienced in Alberta and in particular the Metro Edmonton region. Petroleum and coal products made up Edmonton's largest manufacturing sector in 1987, accounting for over \$2.9 billion in shipments. This sector represents over 38% of the metro area's total manufacturing production and includes facilities for propane, butane, pentane, and sulphur production.

Edmonton is recognized as the oil and gas production, refining and distribution centre for Canada. Over 85% of Alberta's petroleum products are processed in Metro Edmonton refineries.

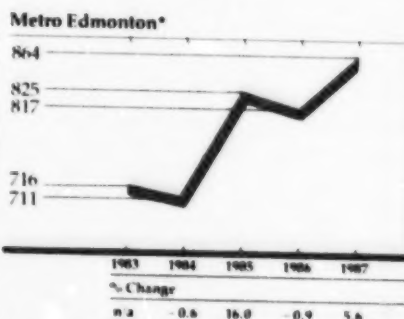
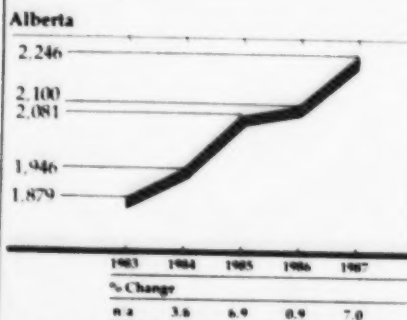
Chemicals and Chemical Products

This sector produced \$1.3 billion of shipments in 1987 and represented over 17% of Edmonton's total manufacturing shipments. Edmonton's petrochemical industry has seen world-scale development in recent years and new expansion programs are planned. Based on readily available natural gas and petroleum feedstocks, the petrochemical industry has a long-term future in the Metro Edmonton area.

Food and Beverage

Food and beverage industries constitute the third largest manufacturing sector, representing over 15% of Metro

Graph 4
Manufacturing Payroll 1983 - 1987
(\$ millions)



In 1987, Metro Edmonton accounted for 38.5% of Alberta's manufacturing payroll.

* Edmonton Economic Development Authority estimates.

Source:

Alberta Bureau of Statistics - Alberta Principal Manufacturing Statistics
Statistics Canada - Catalogue #31-001

Primary metal manufacturing totalled \$538 million in 1987

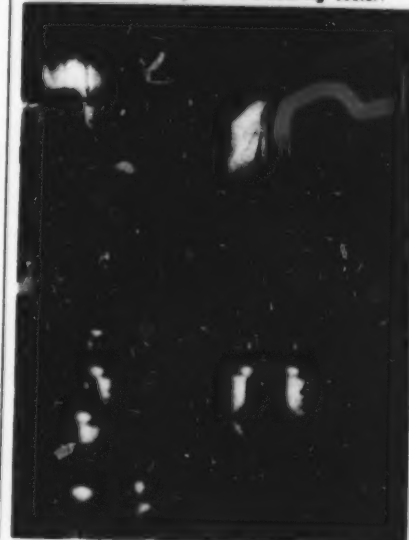
Edmonton's total manufacturing production. This sector will remain prominent in Edmonton with the growing Alberta and out-of-province markets.

The recently built \$8.6 million Alberta Food Processing Development Centre is available to Edmonton area businesses to test new products or processing methods in a specialized environment and facility thereby not having to interrupt their own plant operation.

Primary Metal

The value of primary metal manufacturing was \$538 million in 1987. Future expansion will parallel the continued development of other sectors.

Food and beverage industries make up Edmonton's third largest manufacturing sector.



Metal Fabricating

Metal fabricating has had a high growth rate over the last 20 years, particularly in support of oil and gas exploration and construction of pipelines and processing plants. Production in the metal fabricating industry was an estimated \$315 million in 1987.

Printing, Publishing, and Allied Industries

These industry sectors accounted for \$271 million in shipments in 1987. They continue to exhibit strong growth and will provide new investment opportunities in the future.

Machinery Industries

Meeting a demand for products such as oilfield, commercial, industrial, construction, mining and forestry equipment resulted in more than \$233 million in shipments for machinery industries in 1987.

Non-Metallic Mineral Products

Over \$179 million of non-metallic mineral products were manufactured in 1987, including cement, concrete, glass, and other materials commonly used in construction.

Advanced Technologies

Edmonton is emerging as one of North America's new and progressive advanced technology centres. The city has an enviable array of research institutions and facilities. Edmonton firms are involved in world class development in medical technologies, biotechnology, pharmaceuticals, specialty chemicals, lasers, electronics, instrumentation, computers, advanced materials and aerospace industries.

Edmonton-based advanced technology organizations include:

- Alberta Research Council, Canada's oldest and largest provincial research facility;
- University of Alberta, which operates 20 affiliated research institutes;
- Alberta Oil Sands Technology and Research Authority;
- Syncrude;

Edmonton is emerging as one of North America's most progressive and diversified advanced technology centres.

- Alberta Heritage Foundation for Medical Research;
- Alberta Microelectronics Centre;
- Alberta Laser Institute;
- Electronics Test Centre;
- Coal Research Centre Devon;
- Centre for Frontier Engineering Research;
- Alberta Food Processing Development Centre.

Edmonton is also the location of Canada's fastest growing advanced technology park, Edmonton Research Park. The 130 hectare (320 acre) research and technology community, comprising the Research Park and the adjacent headquarters and laboratories of the Alberta Research Council, is home to 16

organizations employing over 700 scientists, engineers, technicians and support staff. Within the Park, the newly opened Edmonton Advanced Technology Centre is designed to provide new emerging advanced technology firms with a suitable environment from which to grow.

Retail and Service Trade

Expenditures on retail goods and services in Metro Edmonton were valued at \$7.3 billion and are now fourth highest among all Canadian metropolitan areas. Growth of the retail and service industry in Edmonton amounted to 5.6% in 1987. The five-year average annual growth is 5.1%.

Edmonton's 19 major shopping centres have over 1.5 million square metres (16 million square feet) of retail space. West Edmonton Mall, with over 483,000 square metres (5.2 million square feet) is the city's premiere retail showcase. With over 800 stores, the mall is the world's largest indoor shopping and entertainment complex.

In Edmonton's downtown shopping district, the newest completed major project is the retail and hotel phase of the \$600 million Eaton Centre project. Other phases of this project, including additional retail and residential components, are now under construction.

Also recently completed in downtown Edmonton is the \$17 million Manulife Phase II retail project. Over 70 new retail outlets are featured in this complex. Manufacturers Life is considering the addition of a 282-room luxury hotel and approximately 50,000 square metres (538,000 square feet) of office space.

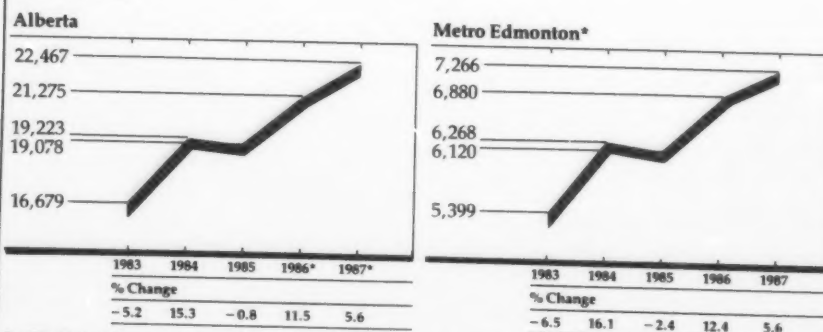
Following the Stewart Green

Properties completion of the new Kingsway Garden Mall Bay store in 1988, work will start on the Hudson's Bay Galleria in the downtown core. This \$60 million renovation and redevelopment of the Jasper Avenue Bay store will include a four-storey, 14,000 square metre (150,000 square foot) Bay store on the west side of the building and an 11,150 square metre (120,000 square foot) galleria on four levels on the east side of 102 Street.

Also nearing completion and scheduled for opening in 1988 is the 3,700 square metre (40,000 square foot) fourth level retail addition to the existing Edmonton Centre complex and the \$200 million Canada Place facility.

Assisting in the coordination of these and other downtown projects is the Edmonton Downtown Development Corporation. This organization was recently established to ensure the efficient development of Edmonton's central business district.

Graph 5
Value of Retail and Service Trade 1983 - 1987
(\$ millions)



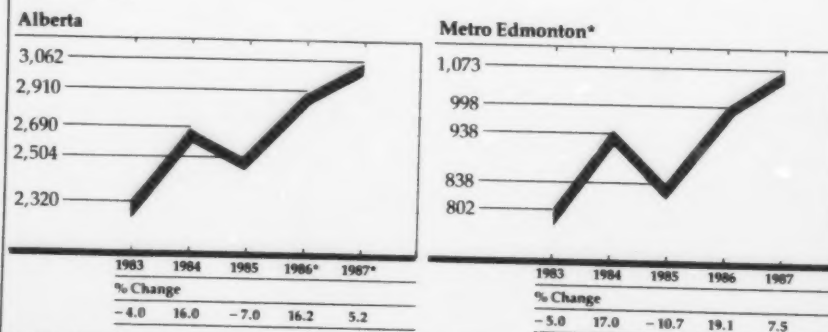
In 1987, Metro Edmonton accounted for over 32% of Alberta's retail and service trade.

* Edmonton Economic Development Authority estimates

Source:

Alberta Bureau of Statistics - Alberta Retail and Service Trade Statistics
Statistics Canada - Catalogue #63-005

Graph 6
Retail and Service Trade Payroll 1983 - 1987
(\$ millions)



In 1987, Metro Edmonton accounted for 35% of Alberta's retail and service trade payroll.

* Edmonton Economic Development Authority estimates

Source:

Alberta Bureau of Statistics - Alberta Retail and Service Trade Statistics
Statistics Canada - CANSIM Matrix #2313

Amidst Edmonton's bustling central business district, you can always find a place to relax.



Construction

Metro Edmonton's building permits totalled almost \$572 million in 1987. Residential permits were 48% of the total, commercial 39%, industrial 7%, and institutional 6%.

Construction prospects for 1988 are positive for Edmonton with the bulk of ongoing and planned projects related to the retail, commercial, and institutional sectors. Retail space in the Edmonton Centre addition, Eaton Centre Phase II, the Kingsway Garden Mall addition, the strip mall at Kensington Crossing, and the Millwoods Town Centre complex will be completed during the year. Added to this will be the start of the Hudson Bay's Galleria redevelopment project and the construction of Manulife Phase II.

While construction of the \$200 million Canada Place complex nears completion, construction of the \$60 million Olympia and York tower is underway. The provincial government has guaranteed that some of its departments will occupy the latter project, scheduled for completion in 1990.

The new Grey Nuns Hospital in Millwoods opened in mid 1988. Following this, the Edmonton General Hospital will receive a \$12 million upgrade. Other institutional renovations in 1988 include the Glenrose Auxilliary Hospital (\$66 million), the Misericordia Hospital (\$23 million) and the Royal Alexandra Hospital (\$74 million). The Cross Cancer Institute will undergo a \$78 million expansion. The additional space and equipment purchases will allow the

More than \$500 million worth of commercial construction is underway in Edmonton's downtown core.

institute to increase its research facilities and accommodate the increased demand for its services. The expansion is scheduled for completion in 1992.

Table 3
Dwelling Starts & Completions 1983 - 1987

Year	Alberta		Metro Edmonton*		% Metro Edm. Starts of Alberta	% Metro Edm. Compl. of Alberta
	Starts	Compl.	Starts	Compl.		
1983	17,134	24,693	6,888	9,463	40.2	38.3
1984	7,295	12,057	2,536	4,788	34.8	39.7
1985	8,337	7,517	2,665	2,507	32.0	33.3
1986	8,462	9,172	2,695	2,859	31.9	31.2
1987	10,790	9,334	3,693	3,262	34.2	34.9

* Edmonton Economic Development Authority estimates

Source: Canada Mortgage and Housing Corporation - Housing Statistics

Graph 7
Metro Edmonton*
Value of Building
Permits - 1987
(\$ thousands)

Residential

274,921

Industrial

39,189

Commercial

224,806

Institutional

32,768

Total

571,684

In 1987, Metro Edmonton accounted for 30.1% of Alberta's building permits.

* Edmonton Economic Development Authority estimates

Source: Statistics Canada - Catalogue #64-203

Table 4
Selected Major Industrial Projects within the Metro Edmonton Market Area*

Sector	Company	Location	Construction Period	Project Value (\$ millions)
Oilsands	Amoco Canada	Elk Point	1988 - **	310
	AOSTRA	Ft. McMurray	1987 - **	50
	BP Canada	Wolf Lake	1987 - 1988	200
	Dome/Canadian-Hunter	Primrose Lake	1988 - 2001	1,500
	Dome/Sulpetro	Lindberg	1986 - 1989	158
	Esso Resources (Two Projects)	Cold Lake	1987 - 1989	378
	Esso Resources	Obed	1988 - **	78
	Esso Resources	Edmonton	1990 - **	1,200
	Home Oil	Swan Hills	1987 - 1988	85
	Husky Oil	Lloydminster	1988 - 1991	1,270
	Husky Oil	Lloydminster	1988 - 2013	900
	OSLO	Ft. McMurray	1995 - **	4,000
	Pan Canadian Petroleum	Elk Point	1987 - 2002	90
	Shell Canada	Virginia Hills	1988 - 1989	127
	Shell Canada	Peace River	1988 - 1993	570
	Shell Canada/Solve-Ex	Ft. McKay	1986 - **	300
	Suncor	Primrose Lake	1987 - 1988	105
	Suncor	Ft. McMurray	1988 - 1991	150
	Suncor et al	Burnt Lake	1988 - 1990	470
	Syncrude Canada (Three Projects)	Ft. McMurray	1983 - 1992	5,485
Petrochemicals	Celanese/Neste Oy/Trans Mtn	Edmonton	1988 - 1990	270
	Chevron	Ft. Saskatchewan	***	50
	Dow Chemical	Ft. Saskatchewan	***	150
	Novacor Chemicals	Joffre	1988 - 1991	400
	Novacor Chemicals	Joffre & Other	1988 - **	1,600
	Shell Canada Resources	Scottford	1988 - **	400
Pipelines	Interprovincial Pipe Line	Edmonton	***	1,000
	NOVA Corp. of Alberta	Various Alta	1988 - 1992	950
	Trans Mountain Pipe Line	Edmonton	1989 - 1991	500
	Trans Mountain Pipe Line	Edmonton	1988 - 1989	85
Forestry	Alberta Newsprint Company	Whitecourt	1988 - 1990	360
	Champion Forest Products	Hinton	1987 - 1989	370
	Daishowa Canada	Peace River	1988 - 1990	500
	Daishowa Canada/Alberta Gov't	Peace River	1988 - 1990	75
	Kruger Inc.	Slave Lake	1989 - **	400
	Millar Western Industries	Whitecourt	1986 - 1988	200
	Pelican Spruce Mills	Drayton Valley	1985 - **	55
Coal	Esso Resources/Pamour Porcupine	Hinton	1988 - 1989	161
	Fording Coal/Edmonton Power	Genesee	1983 - 1989	105
	Seagull Resources	Buffalo Hill	1988 - 1990	98
Communications, Transportation, Utilities	Alberta Gov't Telephones	Rural Alberta	1986 - 1991	450
	City of Edmonton	LRT	1988 - 1990	130
	Edmonton Power	Genesee	1981 - 1991	1,400

* Projects exceeding \$50 million
 ** Completion date undetermined
 *** Awaiting approval

Source: Alberta Economic Development and Trade
 Edmonton Power
 Informetrica Ltd.

Corporate

Office space absorption in 1987 provides evidence of the continuing corporate development occurring in the Metro Edmonton region.

Numerous private sector corporate offices are located in the city. As well, being the capital of the province, Edmonton is the location of most provincial and federal government offices and international consulates.

Over the past five years, Edmonton has experienced considerable corporate growth which is reflected in the city's skyline. Head office locations for construction, transportation, mining, energy, communications, utilities, distribution, and food processing industries attest to the diversity of Edmonton's economy.

Table 5
Edmonton Central Business District Office Space 1983 - 1987
(square metres/ square feet)

Year	Completed	Supply (Inc. previous year's surplus)	Absorption	Cumulative Surplus	% Absorbed
1983	181,341 1,952,000	244,699 2,634,000	84,632 911,000	160,067 1,723,000	34.6
1984	0 0	160,067 1,723,000	42,455 457,000	117,611 1,266,000	26.5
1985	41,805 450,000	159,416 1,716,000	82,681 890,000	76,735 826,000	51.9
1986	20,717 223,000	97,452 1,049,000	28,892 311,000	68,560 738,000	29.6
1987	0 0	68,560 738,000	17,558 189,000	51,002 549,000	25.6

Source: Graeme Young & Associates - The Alberta Real Estate Report, First Quarter 1988.

Table 6
Edmonton Suburban Office Space 1983 - 1987
(square metres/ square feet)

Year	Completed	Supply (Inc. previous year's surplus)	Absorption	Cumulative Surplus	% Absorbed
1983	70,604 760,000	133,776 1,440,000	61,871 666,000	71,905 774,000	46.3
1984	5,295 57,000	77,200 831,000	20,903 225,000	56,297 606,000	27.1
1985	0 0	56,297 606,000	16,072 173,000	40,226 433,000	28.5
1986	6,503 70,000	46,729 503,000	16,165 174,000	30,564 329,000	34.6
1987	0 0	30,564 329,000	5,295 57,000	25,269 272,000	17.3

Source: Graeme Young & Associates - The Alberta Real Estate Report, First Quarter 1988.

Numerous private sector corporate offices are located in the city.

Office space absorption remained strong in 1987.



Population

As the strategic centre of extensive resource-based industries, Edmonton is one of Canada's most affluent and growing population centres. Metro population has increased at an average rate of 1% per year over the past five years.

In 1987, 75% of Metro Edmonton's population was under the age of 45, with 36% of the total population between 25 and 45 years of age.

Total personal income has been rising at an average annual rate of 5.3% over the past five years.

Table 7
Metro Edmonton
Population by Age & Sex - 1987*

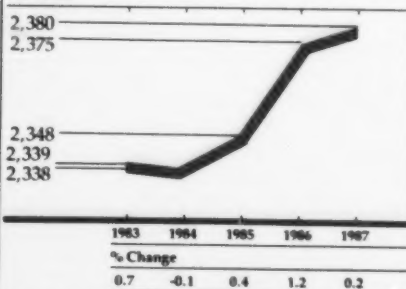
Age	Male	% of Total	Female	% of Total	Sub Total	% of Total	Cumulative Total	% Cumulative
0-4	31,608	4.15	30,324	3.98	61,932	8.13	61,932	8.13
5-14	48,817	6.41	46,304	6.08	95,120	12.49	157,052	20.62
15-24	67,333	8.84	70,609	9.27	137,942	18.11	294,993	38.72
25-44	138,999	18.25	134,778	17.69	273,778	35.94	568,771	74.66
45-64	64,454	8.46	66,565	8.74	131,019	17.20	699,790	91.86
65 +	25,607	3.36	36,369	4.77	61,976	8.14	761,766	100.00
Total	376,817	49.47	384,949	50.53	761,766	100.00		

* Edmonton Economic Development Authority estimates

Source: City of Edmonton, Planning and Building - Edmonton Demographic Indicators 1987
Edmonton Metropolitan Regional Planning Commission

Graph 8
Population 1983 - 1987 as of June 1st
(thousands)

Alberta

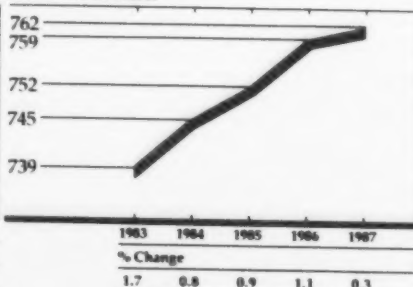


In 1987, Metro Edmonton accounted for 32% of Alberta's population.

Source:

Alberta Bureau of Statistics - Alberta Statistical Review
Edmonton Metropolitan Regional Planning Commission

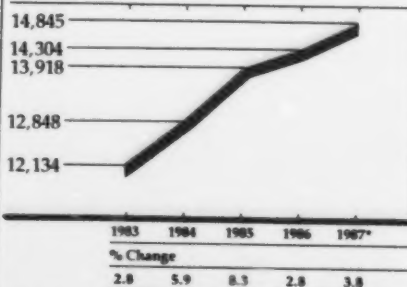
Metro Edmonton



In 1987, 75% of Metro Edmonton's population was under the age of 45.

Graph 9
Per Capita Disposable Income 1983 - 1987

Alberta

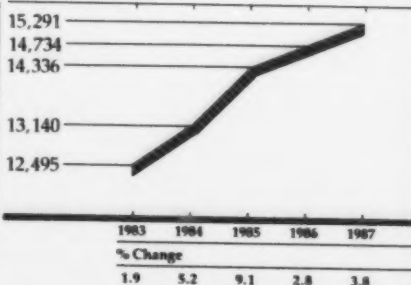


* Edmonton Economic Development Authority estimates

Source:

Alberta Bureau of Statistics
- Alberta Economic Accounts
- Alberta Statistical Review
- Edmonton Metropolitan Regional Planning Commission

Metro Edmonton*



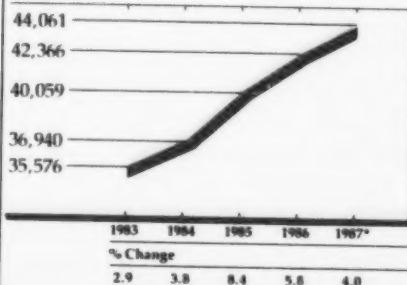
Total personal income in Edmonton totalled \$14.5 billion in 1987. Edmonton's share of provincial personal income was 33% in 1987. Alberta's minimum wage as of September, 1988 is \$4.50 per hour for persons over 18 and \$4.00 for students under 18 years of age. The weekly minimum wage for commission sales personnel is \$180.



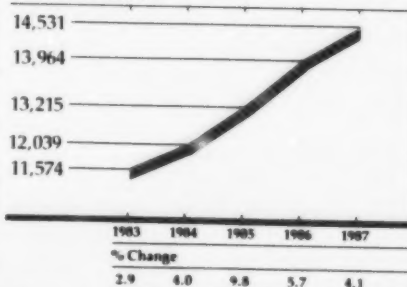
Rising total personal income levels have contributed to the development of new, innovative retail complexes.

Graph 10
Personal Income 1983 - 1987
(\$ millions)

Alberta



Metro Edmonton*



In 1987, Metro Edmonton accounted for 33% of Alberta's personal income.

* Edmonton Economic Development Authority estimates

Source:

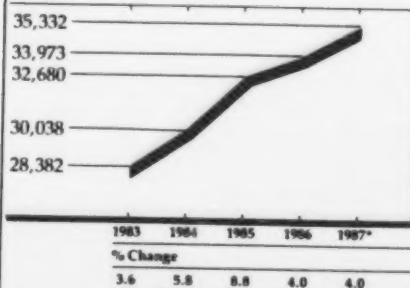
Alberta Bureau of Statistics

- Alberta Economic Accounts

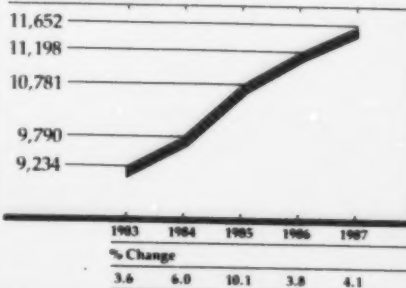
- Alberta Statistical Review

Graph 11
Personal Disposable Income 1983 - 1987
(\$ millions)

Alberta



Metro Edmonton*



In 1987, Metro Edmonton accounted for 34% of Alberta's personal disposable income.

* Edmonton Economic Development Authority estimates

Source:

Alberta Bureau of Statistics

- Alberta Economic Accounts

- Alberta Statistical Review

Edmontonians' disposable income is among the highest in Canada.



Labour Force

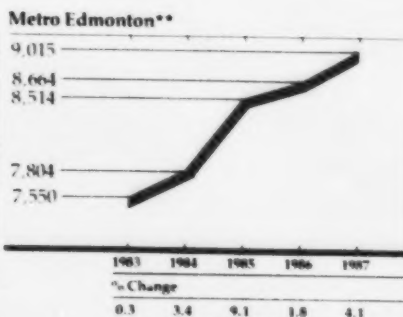
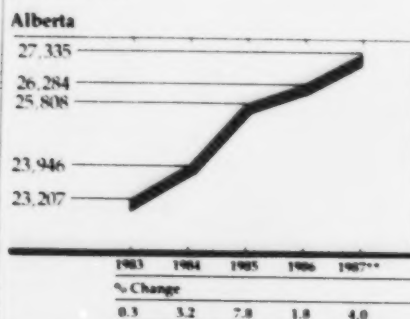
About 80% of Edmonton's population is 15 years of age or over, providing a potential labour force of more than 600,000 people. More than 68% of this population total is between the ages of 15 and 44. This is reflected in an overall labour force participation rate of close to 73%.

Total Metro Edmonton wages and salaries exceeded \$9 billion in 1987.

The University of Alberta, with an enrolment of more than 25,000 full-time students, is Canada's second largest university. It supports industry with faculties in all major disciplines at the undergraduate and graduate levels.

Edmonton plays a very significant role in the education and training of skilled labour. The Alberta Career Development and Employment department consults with employers in order to design special trades training programs at the Northern Alberta Institute of Technology (NAIT). NAIT is one of Canada's largest polytechnical institutes with almost 6,400 full-time students, 4,750 apprenticeship students, and another 24,500 registrants in the continuing education program. Alberta's newest technical institute, Westerra Institute of Technology, complements NAIT and has approximately 3,000 students including 500 full-time, 500 apprenticeship and 2,000 part-time and correspondence students.

Graph 12
Wages and Salaries* 1983 - 1987
(\$ millions)



In 1987, Metro Edmonton accounted for 33% of Alberta's wages and salaries.

* Wages and salaries include supplementary labour income.

** Edmonton Economic Development Authority estimates.

Source:

Alberta Bureau of Statistics - Alberta Economic Accounts



Edmonton's labour force participation rate stands at 73%

Table 8
Labour Force Participation & Unemployment Rates 1983 - 1987
(%)

Year	Participation Rate		Unemployment Rate	
	Alberta	Edmonton	Alberta	Edmonton
1983	71.6	71.4	10.8	12.1
1984	72.1	72.9	11.2	14.1
1985	71.9	72.0	10.1	12.2
1986	72.1	71.6	9.8	11.5
1987	72.0	72.8	9.6	11.3

Source: Statistics Canada - Catalogue #71-001

Transportation

Road

Edmonton is strategically situated at the centre of several major highways. It is on the Yellowhead Highway, designated a Trans-Canada route in 1986, between Winnipeg and Vancouver. Some of the largest trucking firms transporting freight to and from the Pacific coast have switched to the Yellowhead route because of its low grades, favourable climatic conditions, and savings in fuel and time.

Provincial Highway #2 provides freeway access to central and southern Alberta, leading to the American border. Edmonton is the southern terminus for the Mackenzie Highway, the Alaska Highway, and highways serving heavy oil and tar sands operations in the North.

Air

Edmonton is served by two major commercial airports. The Edmonton International Airport, located south of the city, is a marshalling point for freight, goods and services on a global scale. Airlines provide scheduled services to all parts of North America and the world.

The Edmonton Municipal Airport, providing commuter passenger service and corporate aviation facilities, is located within the city, only minutes away from the central business district.

Other airport facilities in the Edmonton area include: Canadian Forces Base Edmonton, located at Namao; a training and recreational airport at Villeneuve and a float/ski airport at Cooking Lake.

Rail

Both Canadian National (CN) and Canadian Pacific (CP) Railways provide comprehensive rail service to the Edmonton region. CN's mainline passes through Edmonton while CP Rail routes freight between Edmonton and its mainline through Calgary.

Existing facilities of both railway systems are currently being expanded and upgraded. CN Rail has an ongoing yard expansion project at its Calder, Bissel and Clover Bar yards.



Numerous air carriers provide ready access to all parts of Canada, the United States, and the world

VIA Rail provides east and west rail passenger service through Edmonton.

Pipelines

Edmonton is the hub of western Canada's pipeline transportation system. Major oil refineries and petrochemical plants are served by numerous pipeline networks. The rapid development of oil exploration and production, including the Alberta oil sands, have kept pipeline construction active. Alberta's first synthetic crude oil pipeline from the Fort McMurray area terminates in Edmonton.

Water

Alberta's road, rail, and air transportation systems give the city access to the Pacific and Arctic Oceans, Great Slave Lake, and the Mackenzie River.

The Mackenzie River system is a major transportation corridor for the distribution of equipment and goods to communities in the Northwest Territories.

Intermodal

The growth in containerization for international trade is well supported by the intermodal services provided in Edmonton. Alberta Intermodal Services

Ltd. is embarking on another year of providing direct service between Edmonton and Vancouver. Door-to-door containerization shipments are being handled through CN and CP intermodal facilities in Edmonton. International marine containers are becoming common in the city as local businesses expand their involvement in international trade.

State-of-the-art intermodal services allow Edmonton firms to transport their products economically worldwide





Being the provincial capital, Edmonton is the location of most government services.

Government

Edmonton is governed at the municipal level by an elected mayor and city council. The municipal government has jurisdiction over urban affairs such as city planning, transportation, police and fire protection. Revenue is provided by property and business taxes, provincial grants and City-owned utilities: telephones, power, sewer, water and sanitation.

The city has an AA credit rating and a yearly capital and operating budget approaching \$1.6 billion.

Edmonton, the provincial capital, is the location of the Alberta Legislature and most of the government's central offices.

The provincial government is headed by a premier with a cabinet chosen from among the elected members of the ruling party in the 83-seat legislative assembly.

The province has legislative authority

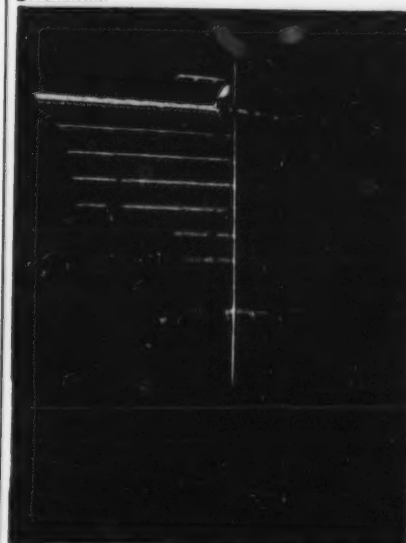
over municipal affairs, education, labour matters, social services, and property and civil rights within its borders.

Alberta does not have a retail sales tax. Oil and gas revenues collected by the province have enabled the government to forego such a tax. Instead budgetary needs are supplemented with income from the Heritage Trust Fund - a \$12.5 billion investment portfolio being preserved for the use of future generations. The provincial budget in 1987-88 was \$10.4 billion.

Canada's federal government is led by a prime minister and a cabinet appointed from the ruling party elected in the 282-seat Parliament.

The federal government's responsibilities are related to interprovincial and international matters. Its revenue sources include personal and corporate income taxes and excise tax.

Edmonton's City Hall is the seat of municipal government.



Quality of Life

History

Edmonton's history dates back to the late 1700s, when fur traders settled along the banks of the North Saskatchewan River where the city is now located. During the 1800s, Fort Edmonton changed from a fur trading centre to an agricultural community. In 1892, Edmonton was incorporated as a town. In 1898, it became the supply and transportation centre for prospectors trekking the overland route to the Klondike goldfields.

The town continued to grow and prosper as the gold rush was followed by the great land rush which swept across the prairies in the early 1900s. In 1904, Edmonton became a city and the following year was selected as the capital city for the new province of Alberta. The 1920s added another romantic chapter to Edmonton's history. Bush pilots based in the city became famous as pioneers in the aviation industry, establishing Edmonton as a centre for modern transportation and trade. Today, Canada's Aviation Hall of Fame is located in Edmonton.

In 1947, the discovery of oil at nearby Leduc ushered in a new industrial era which broadened Edmonton's economic base. The years that followed brought increased activities in mining, manufacturing, commercial ventures, construction, and service industries. Today, Edmonton assumes an important role in western Canadian decision-making and the outlook for the future remains bright.

Climate

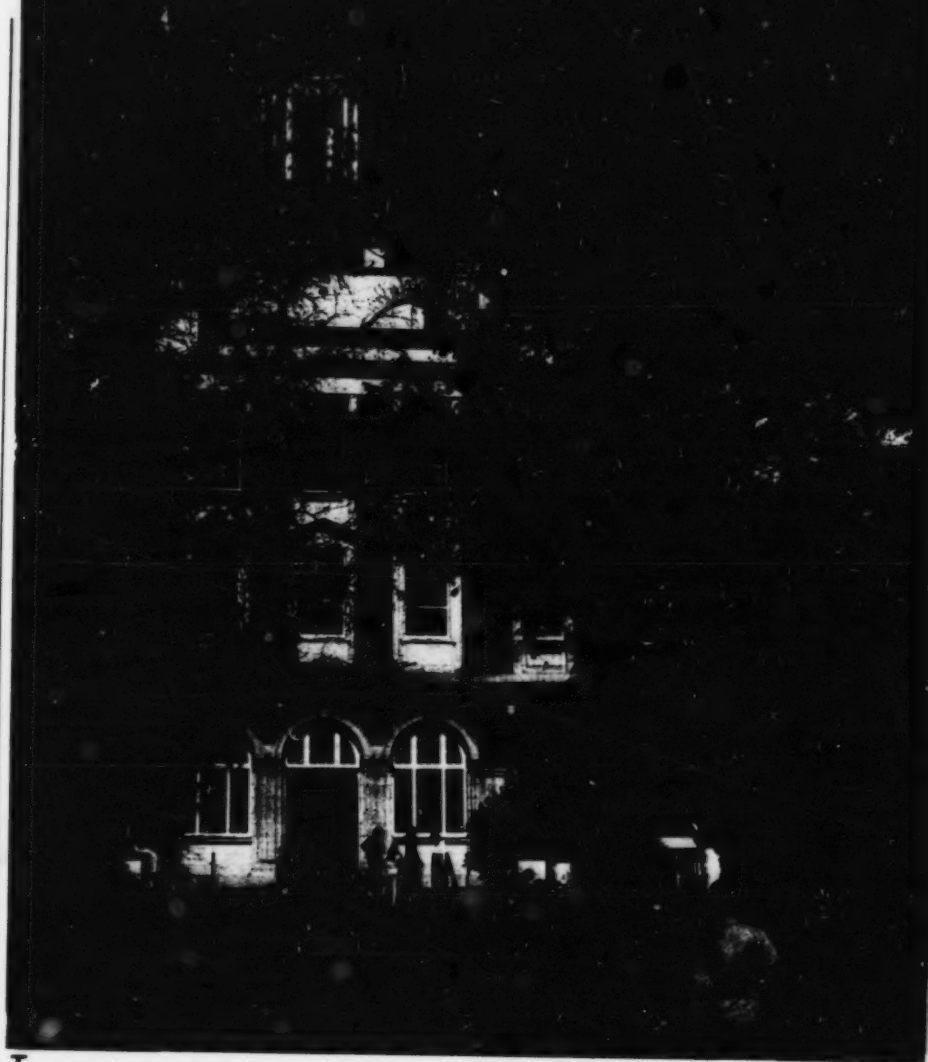
Edmonton has four distinct seasons. Summers are warm, with daytime temperatures averaging 22°C (72°F) and evening temperatures cooling to a pleasant 11°C (52°F). The warm months provide excellent weather for hiking, cycling, trail riding, golf, tennis, and camping.

Winters are characterized by blue skies, low humidity and little wind. The coldest month is January, with the

average high temperature being -11°C (12°F) and the average low being -19°C (0°F). The average annual snowfall of 135 cm (53 in.) is appreciated by winter sport enthusiasts.

Education

Edmonton offers its residents excellent educational facilities with a broad choice of schooling for all needs. An open boundary policy and a variety of programs allow pupils and parents to select educational options in keeping with individual preferences. Special facilities include parochial schools as well as schools for the handicapped and for children with learning disabilities.



The University of Alberta, Canada's second largest university, is located in Edmonton.

Cross-country skiing is one of many winter sports that is enjoyed by Edmontonians.





Edmonton offers a wide choice of accommodations from spacious suburbs to downtown apartments and condominiums.

The University of Alberta, Canada's second largest university, has 19 faculties, including science, engineering, medicine and business and offers programs at the bachelors, masters and doctoral levels. Additional post-secondary institutions include: Concordia Lutheran College, The King's College, Northern Alberta Institute of Technology, offering 63 programs; Westerra Institute of Technology; Athabasca University with unique correspondence degree programs; and Grant MacEwan Community College, with four city campuses.

Housing

Edmonton offers the finest in housing, ranging from single family dwellings and duplexes to apartments and condominium complexes.

Health Services

Edmonton's excellent health services include approximately 4,000 adult beds in seven active-treatment hospitals served by approximately 1,500 medical doctors. A complete range of health services is also offered by the Edmonton Board of Health through 11 community-based centres.

The university's Walter C. Mackenzie Health Sciences Centre, a \$450 million medical complex, opened in 1982 and provides patient care services as well as research and teaching facilities. Western Canada's first heart transplant operation took place at the Centre. The new \$120 million Grey Nuns Hospital in Millwoods opened in May, 1988 and planning for the Northern Alberta Children's Hospital is underway.

Recreation

Edmonton has been declared a Green Survival City by the North American Association of Nurserymen. Capital City Recreation Park extends along the river valley for 16 kilometres (10 miles), offering 55 kilometres (33 miles) of hiking, biking and skiing trails. Along the river valley are numerous golf courses, boat launches, and picnic sites.

Available for public use are numerous hockey rinks, golf courses, curling rinks, swimming centres and tennis facilities. A 61,000-seat stadium, a velodrome, an indoor fieldhouse, a shooting range, and numerous picnic grounds are also available.

The \$450 million Walter C. Mackenzie Health Sciences Centre provides patient care services as well as research and teaching facilities.



In addition to these facilities, Edmonton is close to Elk Island National Park and the famous Jasper and Banff National Parks are within easy driving distance. Within 160 kilometres (100 miles) of Edmonton are more than 50 lakes available for recreational use.

Sports

Edmonton has numerous sport and recreational participation programs. Its unique community league system ensures local residents every opportunity to become involved. In professional sports the city is home to the Edmonton Eskimos of the Canadian Football League, the Edmonton Oilers of the National Hockey League, and the Trappers of the Pacific Coast Baseball League.

Culture

As Edmonton grows, so does its cultural and entertainment facilities. Live theatre companies in the city include the acclaimed Citadel. The Northern Alberta Jubilee Auditorium is home to the Alberta Ballet Company, the Edmonton Opera Association and the Edmonton Symphony. Edmonton's Northlands Coliseum, with a seating capacity of 18,000, is the site of major sports, cultural and entertainment productions.

There are numerous public and private museums and art galleries in the city. The Edmonton Public Library operates 12 neighbourhood branches.

More than 500 restaurants offer a full range of dining experiences. Edmonton's night spots provide for every taste.

Heritage Days is just one of the many cultural and arts events staged in Edmonton each year.

The Edmonton Eskimos were the 1987 Canadian Football League Grey Cup champions.



Shopping

Edmontonians enjoy climate-controlled shopping facilities in numerous malls throughout the metro area. In the downtown area, an ever-expanding system of underground and skywalk pedways link major shopping complexes, office buildings, hotels, and the underground stations of Edmonton's light rail transit system. The world's largest entertainment and retail complex, West Edmonton Mall, with over 800 stores under one roof is located in Edmonton.

Convention Facilities

Edmonton offers world-class convention facilities. The Edmonton Convention Centre, situated on the bank of the North Saskatchewan River, can accommodate delegations of up to 5,000 people. Trade fairs and exhibitions are also held in the Northlands AgriCom, western Canada's largest trade show complex. The city's many hotels provide accommodation at various prices.

City Celebrations

Edmontonians devote a lot of energy to recreation and entertainment. Numerous major celebrations are staged throughout the year.

In the latter half of July, Edmonton returns to the colourful era of the early gold rush days. Klondike Days provides residents and visitors a chance to pan for gold at the Chilkoot Mine, enjoy a midway and exhibition, thoroughbred racing, and all kinds of special entertainment. The festivities are highlighted by the World Championship Sourdough Raft Race, King of the Klondike competition, a Band Extravaganza, and a complete dress-up party downtown.

Other celebrations include: Summerfest, a three-month series of entertainment events featuring performances in music, dance, theatre and visual arts; Jazz City, an international music festival which has gained world stature; the Fringe Theatre Event, a multi-location theatrical showcase and the Edmonton Folk Music Festival.

In winter, Edmonton holds the Snowflake Fantasy Festival which encompasses everything from ice sculptures to outdoor laser light shows.

No matter what the season, Edmonton offers tourists and residents alike many opportunities to join in and celebrate Edmonton's vitality.

The Edmonton Convention Centre can accommodate delegations of up to 5,000 people.

West Edmonton Mall is the world's largest indoor retail and entertainment complex.



Edmonton's river valley, with its many parks and trail systems, provides Edmontonians with unlimited sports and recreational opportunities.

Media

Edmonton has four local TV stations. Two cable television companies supplement this service with local programming, specialty channels and programming from the major American networks. Pay TV is also available through the cable companies.

Edmonton's 18 radio stations span the entire spectrum of broadcasting formats.

Two daily newspapers are augmented by numerous ethnic and community weekly newspapers and a weekly news magazine.

Public Transportation

Edmonton has one of the most innovative transit systems in Canada, and in 1978 became the first city of its size in North America to have a light rail transit system. Handicapped citizens have their own door-to-door transportation system.

A modern light rail transit system is an integral part of Edmonton's efficient public transportation network.



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Corporate Directory

Members of the Edmonton Economic Development Authority

Chairman:

Mr. R.B. (Bob) Snyder
Div. Senior Vice President
NOVA CORPORATION OF ALBERTA

Members:

Mr. John H. Askin
Partner
ASKIN, SCIUR AND SMITH

Mr. Harold B. Banister
Executive Vice President
BANISTER CONTINENTAL

Alderman Judy Bethel
CITY OF EDMONTON

Alderman Bruce Campbell
CITY OF EDMONTON

Mr. John R. Day
Partner
LUCAS, BISHOP AND FRASER

Mr. Vic Mangal
Manager
CANADIAN IMPERIAL BANK OF COMMERCE

Mr. Douglas C. McConnell
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THE COHOS, EVAMY, MCCONNELL PARTNERSHIP

Mr. C. Neil Reimer
National Director Emeritus
ENERGY AND CHEMICAL WORKERS UNION

Mr. Aaron Shtabsky, Q.C.
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Mr. Mike Shybunka
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Mr. Brian Trendel
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